



IBFS Application Filing Checklist

- ☐ **Register with IBFS.** Go to the IBFS Homepage and Click the "New Registration" button. Fill out the form. Be sure to fill out all of the fields and write down your password. When you have completed the registration form click the "Create an Account" button and print out your account number.
- ☐ **Log into IBFS using your user ID and password.**
- ☐ **Fill out an application form.** Choose one of the 15 applications forms. Completely fill out the form.
- ☐ **Validate, Validate, Validate!** Remember to click the "Validate" button to ensure that your data is saved and that all required fields are entered.
- ☐ **Attach supporting documentation.** After you have validated, and before you file your application, use the "Attachment" button(s) to attached supporting documentation. IBFS accepts 6 different formats for attachments: MS Word, WordPerfect, Excel, Lotus, Text and Adobe PDF. Remember to name your attachment and put a brief description in the box provided. Please make sure that the format of the file you attach matches the format you select on the attachments window.
- ☐ **File your application.** In your account maintenance window, scroll down to the list of applications you have filled out. In the left column, click the radio button next to the application you wish to file. (Remember that you can only file one application at a time.) Then scroll down to the bottom of the page and click the "File a Form" button. You will then see a confirmation window. Click "Ok" if you are ready to file the application. Once it is filed, the status of the application will change to "Filed" and a Submission ID will appear under the description of the application.
- ☐ **Print your application and have the applicant or signing official sign it.** Keep this original in your files for future reference. You can print out your application by clicking on the blue link to it in your account maintenance window.
- ☐ **Run the Form 159 program through IBFS.** To complete the filing process, you must file a Form 159 and submit associated fees to Mellon Bank. Do this by clicking the "159 Menu" button. IBFS will list all of the applications in your account that have a "Filed" status. Select one or more applications to file on a single Form 159. (Refer to the Commission's Rules regarding the filing of multiple applications on a single Form 159) Next, click the "continue" button. You will then see a draft Form 159. Enter the Payor Information section, including the Payor TIN. Scroll down and confirm that the pre-filled application information is correct. Once you are satisfied with your Form 159, click the "Process 159" button. This will finalize the 159, BUT WILL NOT ELECTRONICALLY SUBMIT the 159.

☐ **Print out your 159 and mail it and your check to Mellon Bank.** To complete the process, PRINT OUT THE Form 159 and mail it and your check to the appropriate Mellon Bank lockbox address. (See the International and Satellite Services Fee Filing Guide.)

☐ **Congratulations! You have successfully filed through IBFS! Give yourself a pat on the back, and then check the web for the status of your application.**



Good Job!